

# Qatar Consumer Electronics Report Q3 2016

<https://marketpublishers.com/r/Q6CA15587F7EN.html>

Date: May 2016

Pages: 56

Price: US\$ 1,295.00 (Single User License)

ID: Q6CA15587F7EN

## Abstracts

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**BMI View:** Trade data for 2015 supports our view of Qatar's consumer electronics market as one of the best performers in the Middle East in 2015 as demand continued to grow and the oil price decline had only a small impact on consumer sentiment. Over the medium term we believe it will continue to be an outperformer, as project spending and economic development in the context of high incomes will maintain its status as a lucrative market for device vendors. The first-time buyer opportunity is however depleted across most of the market, meaning the potential for volume growth is limited and vendors will largely be reliant on replacement sales. We forecast total device spending will increase at a CAGR of 3.6% over 2016-2020 to USD1.8bn in 2020.

### Latest Updates & Industry Developments

**Computer Hardware Sales:** USD578.72mn in 2016 to USD681.83mn in 2020, a compound annual growth rate (CAGR) of 4.2%. Saturated PC market, including tablets, means explosive growth is not possible, but high incomes should ensure short replacement cycles and premium product bias that will mean Qatar is still lucrative for vendors.

**AV Sales:** USD275.44mn in 2016 to USD324.54mn in 2020, a CAGR of 4.2%. The flat-panel TV market is stagnant in volume terms due to saturation, but UHD and OLED set demand among the large pool of high income households will drive growth - and we believe Qatar could be a leading market for next generation TV set adoption.

**Handset Sales:** USD734.48mn in 2016 to USD820.25mn in 2020, a CAGR of 2.8%. In 2015 lower cost smartphone availability deepened the market to a

larger share of migrant workers, which resulted in an upward revision to the volume outlook, but this upside is countered in the value forecast by the declining average selling price for smartphones.

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